

Historic, Archive Document

Do not assume content reflects current scientific knowledge, policies, or practices.



2815001
F76T copy 2

FOREIGN AGRICULTURE CIRCULAR

U.S. DEPARTMENT OF AGRICULTURE
Foreign Agricultural Service Washington D.C.



CULTURE
LIBRARY

DEC 4 - 1964

TROPICAL PRODUCTS
FTEA 1-59
June 9, 1959

WORLD TEA PRODUCTION UPTREND C & R-ASF.
IS EXPECTED TO CONTINUE

World production of tea during 1959 is forecast at 1,671 million pounds, 17 million pounds greater than in 1958 and 24 percent above average annual production of 1,345 million pounds during 1950-54.

Relatively small increases are expected in India and Ceylon, and production in other Asian countries is expected to remain near current levels.

In Africa production is expected to continue rising because of new plantings and increased output from existing acreage.

Production in Latin America, mostly in Argentina, is expected to approximate 10 million pounds.

If the International Tea Agreement is renewed, 1959 tea production may be reduced. Preliminary talks between producers in India and Ceylon were held during 1958.

PRODUCTION

During 1958 the uptrend continued in world tea production, and is estimated at 1,654 million pounds. This was 4.5 percent above 1957 production of 1,583 million pounds, and 23 percent above the 1950-54 annual production. Africa had the greatest percentage increase in production during 1958 -- 18 percent -- but the quantity of tea involved was comparatively small. India and Ceylon produced almost 70 percent of the world's total, excluding China and the Soviet Union.

Asia

India, with the world's largest crop, produced a record 708.8 million pounds in 1958, 29.9 million pounds above 1957.

The increase was due more to intensive cultivation than to acreage increases. Many of the gardens are now planting up to 4,400 bushes per acre instead of the old practice of planting between 2,200 to 3,000 bushes. The new method of grafting, heavier pruning, and intensive fertilizer application are also increasing yields. Adverse weather conditions and fertilizer shortages held down production last year. Only 50 percent of ammonium sulphate requirements were available because of a shortage of foreign exchange.

During 1958 the government eased certain taxes on tea, making Indian common teas more competitive in the world market.

Reportedly, Indian and Ceylonese producers have agreed on the desirability of renewing the International Tea Agreement. This could result in government action. The draft of an agreement between India and Ceylon is currently reported to be under consideration of the producer organizations in the two countries. and might be submitted to the two governments for their approval.

The Government of India and the Tea Board are considering a proposal to establish a Tea Guarantee Fund to provide financial assistance to needy gardens, especially those producing common teas. Granting railway freight relief to these teas is also being considered. The Tea Board participated in 7 international exhibits during 1958 and is setting up public relation units in Australia and Egypt. Trade delegations visited importing countries last year to establish personal contacts with importers and to strengthen the position of India's teas in the world market.

Domestic tea consumption could be greatly increased. Consumption is increasing at the rate of 10 to 15 million pounds annually, but even so, per capita consumption is only about one cup every 3 days, contrasted to 8 cups per day in the United Kingdom.

There was a record crop of tea produced in Ceylon. Production totaled 413.2 million pounds, 15.4 million pounds more than was produced during 1957.

Tea production reached a new high last year despite strikes, riots, and shipping stoppages. Some adjustments in auctioning and shipping had to be made.

Strikes were negligible while the country was trying to recover from the floods in January of 1958, but in February there were stoppages by government clerks and produce export firms. In late May and early June riots and a curfew disrupted the transportation of tea to the auctions and shipside. The trade tried to cope with the build-up of large stocks by diverting consignments to Galle and Trincomalee, for which a tax rebate was allowed to cover the extra expense.

Civil unrest caused several auctions to be cancelled. Sales of tea based on samples began to be held in Colombo. This tea was shipped direct to Trincomalee for export; some of the tea stored in Colombo was forwarded to Galle.

Tea shipped from Trincomalee is original or unblended and is sold to the United Kingdom and the United States. Medium and low grade teas for the Mideast markets must be blended before export. Even with improved conditions, this system will probably be continued, especially if proposed improvements of Galle and Trincomalee harbors are carried out.

Taxes on tea were increased in 1958. The government increased the export duty to aid growers, especially smallholders affected by lower prices who at times were unable to obtain credit for their teas. This revenue subsidized exports of the lower priced tea. In October an additional tax was levied against tea to finance the Tea Subsidy Act, which subsidizes the replanting and rehabilitation of estates and smallholdings. Owners of tea lands will be paid subsidies for replanting uneconomic areas with approved high yielding varieties of tea, and for rehabilitation of worn out tea lands by the application of fertilizer and adoption of soil conservation measures.

Total taxes on tea are almost half the price realized for some of Ceylon's teas and weakens the competitive position of the crop.

Indonesian production during 1958 declined slightly from the 1957 level, from 156.1 to 153.7 million pounds. This decline in quantity is also reported to be accompanied by a slight decline in quality since nationalization of the Dutch estates.

Prior to nationalization, the Netherlands was the primary European market for Indonesian tea. Now, however, Indonesia has selected Antwerp, Belgium, as the market place for its tea in Europe. Public auctions there were scheduled for late April or early May.

Japan produced 164.4 million pounds of tea during 1958, 3 percent more than in 1957. Frequent, unseasonable frosts and severe drought from late June through the middle of July reportedly caused a drop in yield. Picking of younger leaves to improve quality further reduced the yield per acre.

Almost 97 percent of the tea produced in Japan is green tea. Nearly all of this production is consumed domestically.

In Formosa the tea industry has been hampered by lack of quality control and coordination among growers, buyers, and exporters. However, 1958 production of 35.6 million pounds was up slightly from 1957. Sales of tea to North Africa, a principal market for Formosa, were down last year and face growing competition from Mainland China.

Pakistan's 1958 crop is estimated at 54.1 million pounds, 6 million pounds more than the drought-reduced crop of 1957. Reportedly Pakistan's tea policy is to undergo drastic changes, and may include the following:

1. Compulsory quotas for export would be set.
2. In order to increase the acreage about 10,000 acres would be offered to existing planters annual expansion of 3 percent being required. Failure to carry out Government directives would entail heavy per-acre annual penalties.
3. New estates totaling about 15,000 acres would be promoted. If private enterprise is lacking, the Pakistan Tea Board would establish a few gardens of 600 acres, to be turned over to private enterprise later. Government funds for this development would be made available to the Tea Board.

Under the International Tea Agreement, Pakistan was permitted to produce 80.0 million pounds of tea, a goal not as yet reached.

Tea production is carried on in the most densely populated area of Turkey, the Black Sea region near the Soviet Union. Prior to the beginning of the tea industry, families were leaving this region because of the lack of economic opportunities.

The industry has been assisted by the Government which instituted nursery facilities and also advanced credit to producers. Non-interest bearing loans were made; repayment could be made 5 years later by deducting a portion of the loan as tea was delivered by the producers.

When the tea plantations were started, a cooperative was set up to assist the planters. The majority of cooperatives in Turkey are semi-governmental agencies; however, the tea cooperative is similar to a U. S. cooperative. The Agricultural Bank helps the cooperative extend credit and the cooperative also imports and furnishes supplies, including fertilizer. The cooperative deals with problems between its members and the Government.

Annual consumption of tea in Turkey varies between 12 and 14 million pounds. As domestic production does not now meet this requirement, some tea is imported.

Tea cultivation in Malaya is not exclusively an estate enterprise, but small holders are not particularly interested in the crop. Both highland and lowland teas are produced commercially, and while the lowland tea may be inferior, its greater yield per acre offsets the lower prices.

The Government excluded tea from its agricultural diversification program, since it is not of major importance; however, tea may become a useful secondary crop. The Government has been giving thought to assisting the industry.

Malayan tea is comparable in quality to those of other countries in the area, and has a ready market in the United Kingdom. Recently direct shipments were started to the United States on a trial basis.

At present the greatest deterrents to expansion are increasing production costs and the availability of lower priced imported tea.

Africa

A continued and gradual increase in tea production is taking place in Africa. Production in 1958 was more than 4 times as large as average production during 1935-1939, but Africa still produced only a little over 5 percent of the world's total production in 1958. With the new plantings that are being made and increasing yields from plants reaching maturity, it appears that production will continue to increase.

In East Africa tea is marketed continuously throughout the year. The climate is such that there is continuous development of new leaves. Practically all of the crop, including that scheduled for domestic sale, is sold through a marketing pool. Tea is shipped from East Africa as soon as possible after manufacture, as there is no program of holding or warehousing.

Domestic use of tea amounts to about 25 percent of the tea produced and with the steadily rising African standards of living, it appears that it will increase.

Kenya is the largest tea producer in Africa, and during 1958 harvested a record crop of 25.1 million pounds. In 1958 there were 32,300 acres under tea and licenses have been issued by the Tea Board for more than 40,000 acres of new plantings. During 1958 the tax on manufactured tea was reduced and now amounts to only half of the rate authorized under the Tea Ordinance.

Uganda's production during 1958 amounted to 8.3 million pounds, up only slightly from 1957, but almost double the quantity produced from 1950 through 1954. While tea is not expected to replace either of the present large money earners--cotton and coffee--it should become more important. Out of the total licensed area of 27,610 acres, only about 13,000 acres were under cultivation at the end of 1958.

Tanganyika produced 7.7 million pounds of tea last year, up from 6.1 million pounds in 1957. Further increases are expected, since out of a total planted area of 14,000 acres there are still 3,000 acres not yet producing. The Colonial Development Corporation is reportedly interested in a plan to encourage participation in tea production by owners of small holdings.

Southern Rhodesia produces about 1.5 million pounds of tea each year, all of which is consumed domestically. Two plantations in Rhodesia growing tea under irrigation, perhaps the only area in the world where this is practiced. Reportedly the irrigation experiment is succeeding very well.

Nyasaland the second largest producer in Africa, had a record crop of 23.2 million pounds during 1958. Expansion to 30.0 million pounds in a few years is expected. However, localities suitable for growing tea are limited by climate and available land, and further increases are expected to depend primarily on increasing yields.

Tea is an important export crop in Mozambique. The tea is said to be of good quality. Most of its crop is handled through the London market.

Production in Mauritius and the Belgian Congo is still small, but increasing.

South America

Tea is of minor importance in this area. In Argentina both area and output of tea have increased substantially since 1946, but for the past 3 or 4 years the situation has been static. Domestic consumption requirements apparently have been met, but little has been done to export the surplus. While it is felt that teas of acceptable quality can be produced, it would first be necessary to obtain modern processing and grading machinery.

Brazil produces about 1.6 million pounds of tea each year, domestic consumption taking about half. Reportedly, some machinery has been ordered to produce a product more acceptable to the U. S. market. However, it is not expected that Brazilian production will increase much.

In Peru prospects are for greater production. Much experimental work is being conducted on fertilizer, spacing, pruning and testing of new commercial varieties. This should result in increased output. The most important problem facing the Peruvian tea growers is the large imports of low priced foreign teas (mainly Formosa and Hong Kong). However, these imports may decline because of a recent 200 percent increase in import taxes. Import controls on tea are being considered.

TRADE

World trade in tea reached a new high during 1958. Based on preliminary information, world net exports last year were 1,120 million pounds, compared to 1,014 million during the previous year and 1,083 million during 1956. The 1958 increase may have resulted from the unstable conditions in the Middle East during 1958. The Suez crisis is generally felt to have had a similar effect on increased tea trade in 1956.

During the past year India and Ceylon increased their exports substantially over the 1957 level, and accounted not only for the bulk of the increased exports, but also contributed over 80 percent of the total tea entering trade channels.

India exported 14 percent more tea during 1958 than 1957. The United Kingdom continued as the best customer, taking 331 million pounds out of a total of 506 million. Egypt, the Soviet Union, and the Sudan also substantially increased purchases of tea from India.

Despite internal problems in Ceylon during 1958, net exports of 410.7 million pounds set a record high, 12 percent above the 367.7 million pounds exported in 1957. Exports to the United Kingdom were 31.9 million pounds above the previous year, and exports to Australia were up 20 percent. During the year Australia and Ceylon signed a trade pact that is designed to reestablish the market for Australian wheat flour in Ceylon in return for protection of Ceylon's tea exports to Australia. Last year shipments to Iraq and Egypt declined, to the former probably because of political troubles and to the latter because of currency difficulties.

Japan's net exports of 14.1 million pounds during 1958 were 7.2 million pounds less than in 1957, due primarily to reduced exports to the United Kingdom and South Morocco. Exports from Japan consist mostly of green tea, for which Tunisia, Libya, Algeria, and Morocco are the best customers. Shipments of green tea to the United States amounted to 2.2 million pounds.

Pakistan's exports of 12.7 million pounds topped the 9.8 million pounds exported during 1957, but far below the 1950-54 average of 26.8 million pounds. Under the terms of the lapsed International Tea Agreement, Pakistan could export up to 47.0 million pounds annually.

Indonesian exports during 1958 are estimated at 77.1 million pounds, down slightly from the preceding year. During 1957 the Netherlands, United Kingdom, and Australia were the most important markets; however, during 1958 exports to the Netherlands were only about half as large as in 1957, while exports to the United Kingdom almost doubled. In view of Antwerp having been selected as the market for Indonesian tea, even less tea will probably be exported directly to the Netherlands in the future.

African tea continues to enter the market at an increasing rate, though contributing only 6 percent of the world export total in 1958. During 1958 net exports from this area amounted to 71.7 million pounds, compared to 66.3 million during 1957 and the 1950-54 average of 37.0 million.

Kenya, the largest African producer, ranks second in Africa as a net exporter. During 1958 net exports were 18.3 million pounds, up 1.6 million pounds from 1957.

While Nyasaland is the second largest producer, it ranks as the largest African net exporter, with a total of 21.4 million pounds being exported in 1958. Internal consumption demands in East Africa account for the smaller exports from Kenya.

Exports from Mozambique of 15.2 million pounds exceeded 1957 exports of 12.9 million pounds. Railway freight rates were reduced in an attempt to encourage tea exports.

Exports from the remaining smaller producing countries of Africa were at about the previous year's level.

In South America net exports from Brazil have remained rather small. Peru continues to be a net importer of tea. Argentina possesses the potential to become an exporter, but as yet has only shipped sample lots to the London market.

The United States is second only to the United Kingdom as a market for tea, importing 103.3 million pounds during 1958 compared to 102.2 million in 1957. Imports from India, which had declined for the preceding 3 years, were up slightly. The 39.4 million pounds from India constituted 38 percent of total U. S. tea imports. The gain made by India was offset by a decline in tea imports from Ceylon, the chief U. S. source. U. S. imports from Ceylon during 1958 were 39.3 million pounds, 6.6 million less than in 1957. Imports from Indonesia, Formosa, and East Africa increased slightly.

TEA: Estimated world production 1/, forecast 1959, with comparisons

Continent and country	Average 1935-1939	1950-1954	1956	1957	Preliminary 1958	Forecast 1959
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Asia:						
India	427,565	623,552	667,000	678,838	708,802	715,000
Ceylon	231,525	331,821	375,578	397,775	413,200	420,000
Japan	114,220	112,405	155,970	159,573	164,438	165,000
Indonesia <u>2/</u>	170,182	130,340	138,407	156,132	153,740	153,200
Pakistan	3/	53,431	54,621	48,000	54,100	52,000
Formosa	25,200	24,972	28,660	34,592	35,657	36,000
Turkey	--	968	3,263	5,291	6,200	6,600
Malaya	1,022	3,985	5,023	5,247	4,878	5,300
Iran	1,429	11,906	14,109	14,550	15,000	15,000
Total Asia	971,143	1,293,380	1,442,631	1,499,998	1,556,015	1,568,100
Africa:						
Kenya	9,488	15,094	21,300	22,014	25,179	26,500
Uganda	413	4,672	6,790	8,046	8,267	8,600
Tanganyika	359	2,508	5,376	6,171	7,688	8,000
Southern Rhodesia ...	153	899	1,400	1,353	1,400	1,500
Nyasaland	9,238	15,036	20,654	18,088	23,293	24,000
Mozambique	925	7,595	14,535	12,939	15,430	16,000
Belgian Congo	--	1,023	3,287	4,541	5,500	6,000
Mauritius	110	908	1,538	1,894	2,200	2,400
Total Africa	20,686	47,735	74,880	75,046	88,957	93,000
South America:						
Argentina	--	690	3,748	4,600	5,400	6,000
Brazil	--	1,596	1,612	1,625	1,600	1,600
Peru	--	1,231	1,874	2,094	2,315	2,700
Total South America ...	--	3,517	7,234	8,319	9,315	10,300
World total	991,829	1,344,632	1,524,745	1,583,363	1,654,287	1,671,400

1/ Includes tea produced for domestic consumption.

2/ Beginning 1951, includes total production of small holders not previously reported.

3/ Included with India prior to 1947, 4 year average 1947-50.

Foreign Agricultural Service. Official estimates of foreign governments. Other foreign source material, reports of Agricultural Attaches and other U. S. representatives abroad, International Tea Committee, and other information.

TEA: World net exports, averages 1935-39, 1950-54;
annual 1956 to 1958

Country of origin	Average 1935-39	Average 1950-54	1956	1957 1/	1958 2/
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Asia:					
India	328,653	438,098	519,473	442,369	505,880
Ceylon	221,567	323,165	357,780	367,732	410,773
Japan	42,680	23,792	21,059	21,357	14,116
Indonesia	152,371	74,349	75,893	78,707	77,161
Pakistan	3/	26,813	23,524	9,836	12,688
Formosa	22,718	23,668	23,505	26,443	27,000
Turkey	-	-	-	-	-
Malaya	-	-	-	-	-
Iran	-	-	-	-	-
Total Asia	767,989	909,885	1,021,253	946,444	1,047,618
Africa:					
Kenya	8,180	9,112	15,582	16,728	18,376
Uganda	134	2,727	5,380	6,124	5,987
Tanganyika	6	2,525	4,426	4,867	5,240
Southern Rhodesia	-	-	-	-	-
Nyasaland	8,834	15,140	19,759	20,026	21,400
Mozambique	807	7,505	13,459	12,939	15,221
Belgium Congo	-	-	2,749	4,705	4,850
Mauritius	-	-	313	972	704
Total Africa	17,961	37,009	61,668	66,361	71,778
South America:					
Argentina	-	-	-	-	-
Brazil	-	753	493	872	800
Peru	-	-	-	-	-
Total South America	-	753	493	872	800
World total	785,950	947,647	1,083,414	1,013,677	1,120,196

1/ Preliminary. 2/ Estimate based on 10 months data for Indonesia, 11 months data for Belgian Congo. Office estimate for Formosa and Brazil. Other countries preliminary official figures. 3/ Included with India.

Foreign Agricultural Service. Official publications of Foreign Governments, reports of Agricultural Attaches and other United States representatives abroad, and other information.

TEA: Indian exports to specified countries
1955-1958

Country	1955	1956	1957	1958
Pounds				
United Kingdom	242,660,566	363,849,849	301,716,391	330,917,775
Egypt	10,098,994	23,174,777	16,413,136	25,521,166
United States	24,034,997	28,357,350	23,339,110	25,494,453
Russia	-	13,023,431	15,948,084	25,277,890
Canada	16,457,296	22,623,702	16,883,471	19,044,378
Ireland	17,363,148	16,729,013	19,455,365	15,852,350
Sudan	1/	6,700,210	4,363,940	13,961,621
Iran	2,916,058	45,820	9,944,158	12,012,665
Turkey	2,875,756	5,822,683	7,117,209	8,212,777
Australia	6,155,127	9,395,834	7,896,030	7,289,328
West Germany	3,084,552	6,263,724	4,127,747	4,268,733
Netherlands	1,446,799	4,861,134	1,893,297	2,838,769
Others	36,561,908	19,114,614	14,292,807	15,719,453
Total	363,655,201	519,962,141	443,390,745	506,411,358

1/ If any included with others.

Source: Monthly Statistics of the Foreign Trade of India.

TEA: Ceylon's exports to specified countries
1955 - 1958

Country	1955	1956	1957	1958
Pounds				
United Kingdom	121,463,216	141,432,130	132,648,869	164,552,805
United States	34,984,378	35,338,851	39,155,535	37,584,613
Australia	40,530,273	33,316,550	34,814,021	41,644,525
Iraq	30,287,075	24,509,299	30,682,393	25,868,762
Union of S. Africa ..	22,845,024	26,910,009	25,434,753	24,849,828
Egypt	25,017,192	10,707,829	9,825,255	5,091,393
Canada	17,756,828	19,408,433	17,417,095	17,661,685
Iran	5,866,869	5,220,876	11,328,871	15,290,153
Netherlands	7,265,897	8,436,131	5,613,863	6,552,681
Tunisia	2,641,639	5,875,531	5,022,531	3,806,878
Libya	4,046,154	3,499,443	4,931,970	4,297,909
Other	49,530,645	43,124,721	50,857,212	63,572,182
Total	362,235,190	357,779,803	367,732,368	410,773,414

Source: Ceylon Customs Returns.

TEA: United States imports by country of origin
1954-1958

Country	1954	1955	1956	1957	1958
Pounds					
Ceylon	39,795,406	38,894,367	41,901,697	46,045,346	39,428,999
India	39,909,096	36,442,978	31,669,984	26,978,258	29,920,695
Indonesia	15,528,681	13,461,061	12,137,885	13,769,862	15,352,385
Formosa	5,445,157	3,533,192	4,108,662	4,769,852	6,106,164
Japan	5,583,009	3,211,123	3,539,452	3,030,987	2,972,889
British E. Africa	1,785,946	2,294,465	3,072,208	2,347,778	3,466,101
Mozambique	3,045,327	1,726,878	1,230,764	909,668	411,938
Pakistan	20,142	58,951	65,382	230,386	-
Belgian Congo	15,874	33,929	165,536	502,026	367,375
Rhodesia and Nyasaland	10,325	192,341	207,573	142,917	118,416
Brazil	184,084	283,968	132,065	288,484	343,952
Others	3,377,720	4,495,122	2,292,333	3,212,814	4,848,662
Total	114,700,767	104,628,375	100,523,541	102,228,378	103,337,576

Source: Bureau of the Census.

TEA: Kenya's exports to specified countries
1955 - 1958

Country of destination	1955	1956	1957	1958
Pounds				
United Kingdom	8,124,000	10,537,000	12,034,884	11,665,934
Ireland	-	-	-	10,516
Canada	608,000	1,166,200	1,461,162	1,478,831
United States	1,452,000	1,877,600	1,431,842	2,200,153
South Africa	377,000	588,700	987,269	1,050,509
Australia	73,000	-	120,124	552,790
Netherlands	-	5,000	185,940	442,872
Others	2,304,000	1,407,600	506,609	974,617
Total	12,938,000	15,582,100	16,727,830	18,376,222

Source: Official Trade Statistics.

TEA: Indonesian exports to specified countries
1955-1958

Country	1955	1956	1957	1958 Jan.-Oct.
	<u>Pounds</u>			
Netherlands	25,366,128	30,785,034	32,998,453	11,382,350
United Kingdom	9,265,934	13,068,869	13,888,980	29,929,650
Australia	3,686,091	11,814,451	10,513,737	6,970,945
United States	5,950,215	6,256,655	5,390,247	6,849,692
West Germany	1,796,749	2,579,382	3,756,638	3,981,508
Singapore	8,229,772	4,041,032	4,301,175	2,339,081
Egypt	1,821,000	2,391,991	2,085,552	-
Penang	2,045,869	1,366,852	1,580,698	1,069,231
U. S. S. R.	-	-	701,063	-
Other	5,965,647	3,688,296	3,489,882	2,718,271
Total	64,127,405	75,992,562	78,706,425	65,240,728

Source: Central Bureau of Statistics.

TEA: Formosa's exports to specified countries
1953 - 1957

Country of destination	1953	1954	1955	1956	1957
	<u>1,000</u>	<u>1,000</u>	<u>1,000</u>	<u>1,000</u>	<u>1,000</u>
	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>
United Kingdom	1,249	7,958	2,987	3,055	2,548
Chile	1,169	3,511	1,133	1,670	1,847
West Germany	-	212	351	389	648
Hong Kong	4,678	6,139	4,359	3,342	5,128
Netherlands	158	1,281	907	1,738	1,088
United States	2,540	5,737	2,468	4,302	3,449
Morocco	10,649	5,100	1,826	5,256	6,937
Thailand	1,106	1,080	1,077	1,234	1,203
Others	1,327	2,305	2,018	2,538	3,597
Total	22,876	33,323	17,126	23,524	26,445

Source: The Trade of China (Formosa).

UNITED STATES DEPARTMENT OF AGRICULTURE
WASHINGTON 25, D. C.

Penalty for Private Use to Avoid
Payment of Postage, \$300

OFFICIAL BUSINESS